

Class Calendar Release Notes

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New Functionality ...

Excel Spreadsheet Views

It is now possible to view or download many types of Class Calendar data in Microsoft Excel spreadsheet format.

For the school administrator, many Class Calendar tasks involve viewing lists of business entities, including customers, staff, orders, and invoices. With this release, we have enabled these to be viewed as a spreadsheet - in addition to the web page view.

To use this view, you need a desktop application that can read Microsoft Excel (.xls) files. The options are:

Microsoft Excel 2007
<http://office.microsoft.com/en-us/excel/>

Microsoft Excel 2004 for Mac
<http://www.microsoft.com/mac/products/excel2004/excel2004.aspx>

Open Office (free - for Windows, Mac OS X and Linux)
<http://www.openoffice.org/>

Apple iWork Leopard (expected release October 2007)
<http://www.apple.com/iwork/>

All of these applications behave in the same way with an '.xls' file - they display the spreadsheet, calculate totals formulae, and allow you to save the document.

Excel views are available at the following places within the Class Calendar school perspective. Each relates to a specific business entity:

Customers

- *Diary* - The diary view shows you the classes taking place on the selected day. If there are bookings on any of these classes, you can click on 'show customers' for a specific class. The list of classes is now preceded with an 'Excel file' button.
- *Customers* - The customers view allows you to select groups of customers using a variety of criteria. If any customers are listed, this list is preceded with an 'Excel file' button.

Staff

- *School details > Staff* - In the school details view, scroll down to the Staff pane, and click on 'update'. You now have access to all the staff records for the school. Again this list has an 'Excel file' button.

Orders

- *Account > Account activity* - In the account view, click on 'details' in the Account activity pane. In this view, the 'Excel file' button gives you a view of the orders behind the activity report. (If there are no orders for the given criteria, the button is greyed out.)
- *Orders* - In the orders view, you can select a trading date, and view the orders placed on that date. The 'Excel file' button gives you a view of these orders.

Invoices

- *Account > Class Calendar invoice* - This section allows you to see the Class Calendar invoice for the given accounting month. The 'Excel file' button gives you the same information in a spreadsheet format. (Note that the button is greyed out for the current month, because the invoice is not complete.)

Web browsers vary in how they handle the spreadsheet download:

- *Internet Explorer 7* - allows you to either download the spreadsheet, or view the spreadsheet within Internet Explorer itself. The latter is the simplest and most direct approach.
- *Firefox 2* - allows you to either download the spreadsheet, or open the spreadsheet in an appropriate desktop application.
- *Safari 2* - only allows you to download the spreadsheet to the desktop.

Note that these spreadsheets are in a slightly different format the comma-separated values (CSV) files available in the Web Services Class Calendar application. This is because the Web Services application places emphasis on data integration between Class Calendar and school IT systems, whereas the 'Excel file' functions try to present the data in a more human-readable form.

A note on School Administrator accounts ...

In previous versions of Class Calendar, school administrators could not update their personal details or create new school administrator accounts. This is now possible (see 'Staff' above). We make the following recommendations in using this functionality:

- *Don't share accounts* - Every individual should have their own account. Sharing user names and passwords can reduce security.
- *Use 'Sales staff' accounts wherever appropriate* - If an individual is only involved in selling and customer management, create a 'Sales staff' account for them. This way, they can't accidentally change the school setup.
- *Remove authentication from unused accounts* - If a sales or school administrator account is no longer needed, click on 'remove authentication' for that account. This prevents anyone logging on with that user name and password. (Note that it may take several minutes for the account to be disabled.)